F. 25-7

Core Process Model

Convert Watch List Positions between Transfer External Positions into Portfolios Transfer Internal Save Watch List to Portfolio Portfolios Sell from Portfolio Manage Portfolio 760 1381 750 755 754 (Watch List) PF: 18-30; SL: 54-67 Narr: 100-113 **Present Portfolio** Buy to Add to Modify Watch (Watch List) Portfolio Modify Portfolio List 740 748 745. 736 コープ Customized Save Watch Asset Allocation Delete List Construct Portfolio 732 734 (Watch List) Provide One-Click Populate Portfolio Recommendation **Buy Portfolio** PF: 10-17; SL: 44-53 Narr: 89-99 Diversification Self-Directed Present Asset Allocation Modify 728 4 724. 750. 720 Recommendation Recommendation Recommendation Recommendation Allocate Assets **Optimal Asset** PF : 7-8; SL :41-43 Narr : 84-88 Delete Asset Save Asset Allocation Allocation Determine Allocation (Profile) (Profile) to User Present ゴゲ 10 4 User Fills Out Questionnaire Profile Investor Questionnaire Questionnaire Responses Responses PF:6; SL: 39-40; Narr: 80-83 Submit Modify 100 706 104 464

Core Process Model